

Brainloop Secure Connector for Microsoft PowerPoint

Version 4.5

User Guide



Content

1	Welcome to the Brainloop Secure Connector for Microsoft PowerPoint	3
2	Using the Brainloop Secure Connector for Microsoft PowerPoint for the First Time	5
2.1	Configure Dataroom Servers	5
2.2	Further Settings.....	7
3	Brainloop Secure Connector for Microsoft PowerPoint and its Functions	8
3.1	Navigate Datarooms and their Contents.....	8
3.1.1	Open the Current Folder in Tree View	9
3.1.2	View Recently Opened Folders.....	9
3.1.3	Search for a Document or a Folder in a Dataroom	10
3.1.4	Refresh Dataroom Contents	10
3.2	Open a PowerPoint Document from a Dataroom	11
3.2.1	Open a Recently Viewed PowerPoint Document.....	12
3.3	Open a PowerPoint Document in the Web Browser.....	13
3.4	Rename a PowerPoint Document in a Dataroom	14
3.5	Delete a PowerPoint Document from a Dataroom.....	15
3.6	Save a PowerPoint Document to a Dataroom	16
3.6.1	Save a Local PowerPoint Document to a Dataroom	16
3.6.2	Save a PowerPoint Document to a Dataroom in PDF Format.....	17
3.7	Create a New Folder in a Dataroom	18
3.8	Send a PowerPoint Document as Secure Link	19
3.9	Show Document Properties from the Dataroom	20
3.9.1	Add a Description to the Current PowerPoint Document.....	20
3.9.2	Open a PowerPoint Document in the Web Browser.....	21
3.10	Check out a PowerPoint Document from the Dataroom	22
3.11	Check a PowerPoint Document back into the Dataroom.....	23
3.12	Create a Task for Collaborators	23
4	Appendix: Document revision history	25

1 Welcome to the Brainloop Secure Connector for Microsoft PowerPoint

The Brainloop Secure Connector for Microsoft PowerPoint is a client-based software program that seamlessly integrates Microsoft PowerPoint with the Brainloop Secure Dataroom. This allows you to securely work on PowerPoint documents with parties who do not have access to your company's Intranet.

The Brainloop Secure Connector for Microsoft PowerPoint enables you to safely navigate Datarooms from within Microsoft PowerPoint, to open and save PowerPoint files directly from and to the Dataroom. Depending on your Dataroom permissions, you can also check PowerPoint documents out from and back into the Dataroom and send tasks to your collaborators.

In detail, the Brainloop Secure Connector for Microsoft PowerPoint offers the following features:

- **Brainloop function on Home ribbon**

The Brainloop Secure Connector for Microsoft Office offers a **Brainloop** menu that is displayed in the **Home** ribbon of Microsoft PowerPoint. The **Brainloop** menu in Microsoft PowerPoint shares the server connection configuration with the Brainloop Secure Connector for Microsoft Outlook.

- **Upload a PowerPoint document into a Dataroom**

Click the **Brainloop** button in the **Home** ribbon and select **Save** to upload the currently opened PowerPoint document to a Dataroom. In the **Save Document in Dataroom** pane, you can navigate to the desired Dataroom folder and enter a filename. By activating the **Save as PDF** option, you can save your PowerPoint spreadsheet in PDF format directly.

- **Download and edit a PowerPoint document from a Dataroom**

Click the **Brainloop** button in the **Home** ribbon and click **Open**. In the **Open Document from Dataroom** pane, you can navigate your Dataroom folders to select the desired PowerPoint spreadsheet. Press **Ctrl+S** or select **Save** from the **Brainloop** control button to save your changes back to the Dataroom. Alternatively, you can open a recently opened PowerPoint document by mouse over on the **Open** menu in the **Brainloop** control. The list of recently viewed PowerPoint documents is displayed to the right.

- **View or modify document properties**

When you are working on a PowerPoint document in a Dataroom, click **Show properties** in the **Brainloop** control button. In the **Document Properties** pane, you can view and change the document description, if applicable. For newly created documents you can also change the document name. In addition, you can see the Dataroom access path, the document status, the

version number, version history, and the creation and modification dates as stored in the Dataroom in this pane.

- **Collaboration on PowerPoint spreadsheets with Dataroom members**

If you and your coworkers, collaborators, or team members have installed the Brainloop Secure Connector for Microsoft Outlook and Microsoft PowerPoint, collaboration on PowerPoint spreadsheets becomes easy. You can send a PowerPoint document on which you are working as a secure link to the persons concerned from Microsoft PowerPoint directly. In the e-mail you receive, the Brainloop Secure Connector for Microsoft Outlook offers you an **Edit** action, so that you can open and edit the document directly in Microsoft PowerPoint.

- **Check PowerPoint documents out of and into a Dataroom**

Provided the **Enable Check Out** option is activated for the corresponding Dataroom, you can check a PowerPoint document out from the Dataroom to modify its contents and check it back into the Dataroom directly from within Microsoft PowerPoint.

- **Create tasks and send them to collaborators**

Provided the **Tasks** option is activated for the corresponding Dataroom, you can create tasks and send them via secure e-mail to your collaborators directly from within Microsoft PowerPoint.

- **Integrated Dataroom search function**

Searching for documents in a Dataroom from within Microsoft PowerPoint has been significantly simplified. You can easily and quickly search for documents in the **Open Document from Dataroom** and the **Save Document to Dataroom** panes simply by clicking the new **Search** button  and entering the search term.

- **Open a folder or document in the web browser**

A simple right-click on a folder or a document in the **Open Document from Dataroom** and the **Save Document to Dataroom** panes opens the folder or the document with its **Details** window open in the Brainloop Secure Dataroom Service.

- **New option to rename documents in the Dataroom**

If you wish to rename a document in a Dataroom, you can do so in the **Open Document from Dataroom** and the **Save Document to Dataroom** panes simply by right-clicking the corresponding document.

- **New option to delete documents in the Dataroom**

If you wish to delete a document in a Dataroom, you can do so in the **Open Document from Dataroom** and the **Save Document to Dataroom** panes simply by right-clicking the corresponding document.

2 Using the Brainloop Secure Connector for Microsoft PowerPoint for the First Time

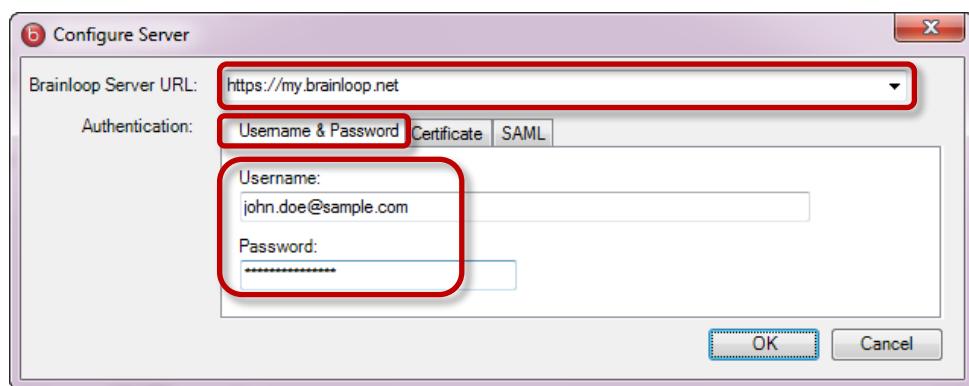
2.1 Configure Dataroom Servers

Once the Brainloop Secure Connector for Microsoft Office has been installed on your computer, the application is available right within Microsoft PowerPoint.

When you open Microsoft PowerPoint after the first installation of the Brainloop Secure Connector you need to configure one or more Dataroom servers.

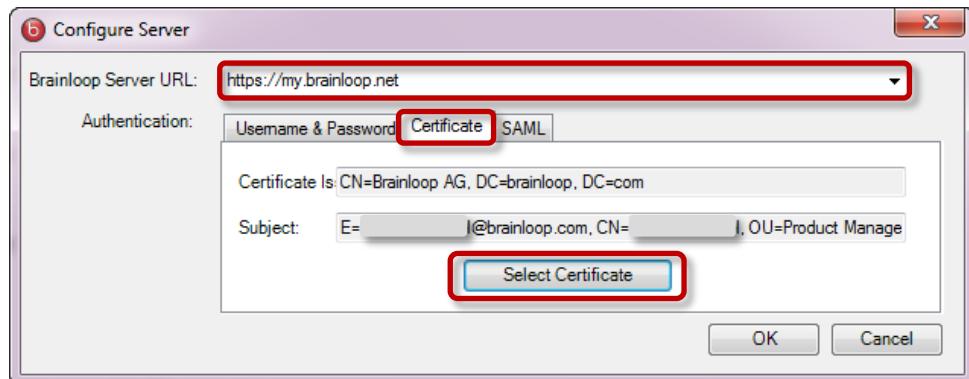
Note: If your Dataroom servers have been configured in the Brainloop Secure Connector for Microsoft Outlook, they are already available in Microsoft PowerPoint.

1. Click the **Dataroom** button and select the **Settings** option.
2. Click the **Servers** option and click the **Add** button.
3. The **Configure Server** dialog window is displayed.
4. Open the **Brainloop Server URL** drop-down list and select a Dataroom server or type the server's URL into the field. **Note:** The most common Dataroom servers (.NET, .US and .CH) can be selected from the list; other URLs must be entered manually into the field.
 - a. To **authenticate with your e-mail address and password**, proceed as follows:
 - In the **Username & Password** tab, enter your **Username** (your **e-mail address** you defined during your first registration to the Dataroom server) and your **Password**.



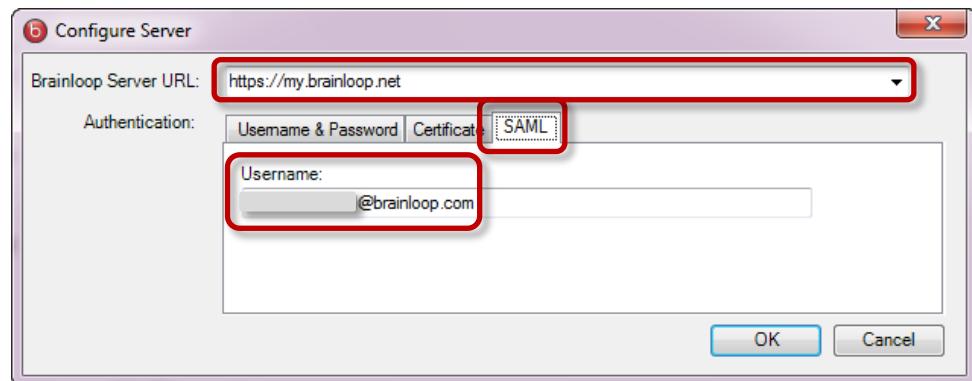
b. To **authenticate with your Dataroom certificate**, proceed as follows:

- Open the **Certificate** tab. Click the **Select Certificate** button, and select the appropriate certificate from the list. Certificate details are then shown in the respective fields.



c. To **authenticate with your SAML login**, proceed as follows:

- Open the **SAML** tab. Enter your **Username** (your **e-mail address** you defined during your first registration to the Dataroom server).



5. Click **OK** to save your settings.
6. Once the connection to the given Dataroom server has been established a corresponding message is displayed.
7. Click **OK** to confirm this message.
8. The **Change Settings** dialog window is displayed with the **Servers** pane open by default.
9. You can now add further Dataroom servers.
10. If this is not required, click **OK** to close this dialog window.

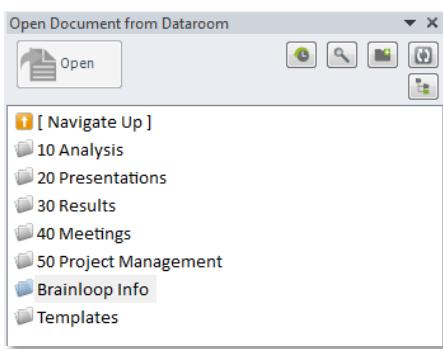
2.2 Further Settings

For details on further settings in the **Settings** dialog window, please refer to our [Client Installation and Setup Guide](#).

3 Brainloop Secure Connector for Microsoft PowerPoint and its Functions

3.1 Navigate Datarooms and their Contents

The **Open Document from Dataroom** pane as well as the **Save Document to Dataroom** pane show different Datarooms, Dataroom folders, or PowerPoint files. Here, you can navigate a Dataroom to select a PowerPoint document that is to be opened in or saved to Microsoft PowerPoint.



i Note: The list of files in the Dataroom view is cached for seven days. To refresh the current Dataroom view in the Brainloop Secure Connector and to remove all items from the local cache, click .

Double-click a server URL to display the Datarooms installed on that Dataroom server.

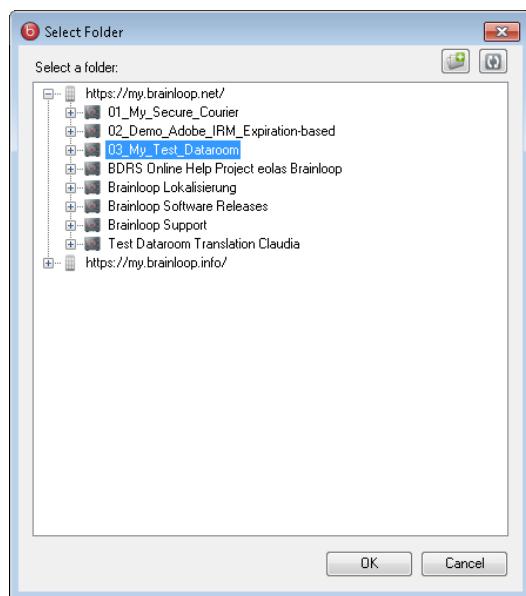
Double-click a Dataroom to show its folders. Double-click a folder to show its contents.

To jump back to the previous level, double-click **Navigate Up**.

i Tip: You can also navigate your Datarooms and their contents by clicking  in the top right corner of the pane. See [Open the Current Folder in Tree View, page 9](#).

3.1.1 Open the Current Folder in Tree View

To navigate a Dataroom, or a Dataroom folder in tree view, click .



Navigate the tree view by clicking the name of a Dataroom or Dataroom folder.

Click **OK** to return to the **Open Document from Dataroom** pane.

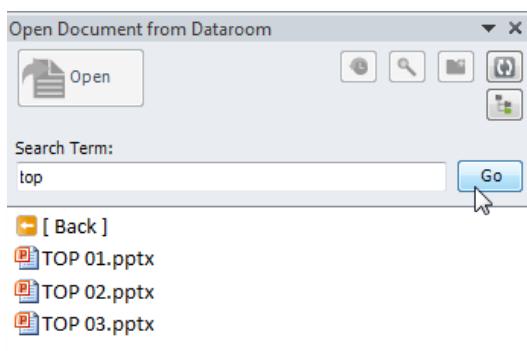
3.1.2 View Recently Opened Folders

To navigate quickly to your last opened folders, click . Your last opened Dataroom folders are shown in a list.

To delete a folder from that list, click . This will not delete the folder from the Dataroom.

3.1.3 Search for a Document or a Folder in a Dataroom

1. To search for a document in the Dataroom, click . The **Search Term** field is displayed:



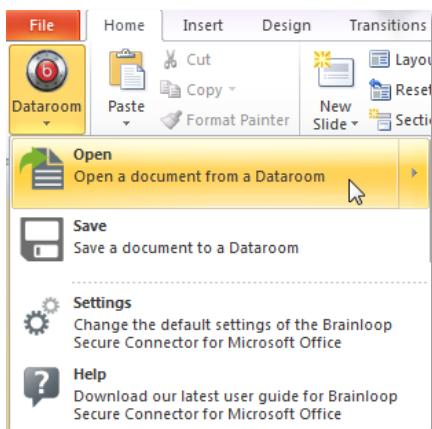
2. Enter a word that is contained in the name or in the contents of the PowerPoint file you are looking for and click **Go** or press **Enter**. **Tip:** If you only know part of the word contained in the document name or in the document, enter the word followed by an asterisk *, e.g. test*.
3. To return to the last opened Dataroom folder, click the  button.
4. To close the **Search Term** field, click  again.

3.1.4 Refresh Dataroom Contents

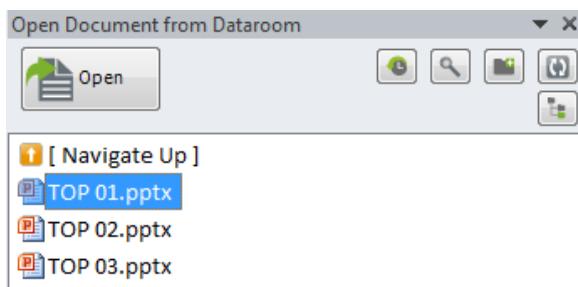
Since the local cache is saved for seven days, we recommend you refresh the Dataroom view on a regular basis. To refresh the current Dataroom view in the Brainloop Secure Connector and to remove all items from the local cache, click .

3.2 Open a PowerPoint Document from a Dataroom

1. Open Microsoft PowerPoint.
2. Click the **Dataroom** button and select **Open**.



3. In the **Open Document from Dataroom** pane, navigate to the desired Dataroom folder.

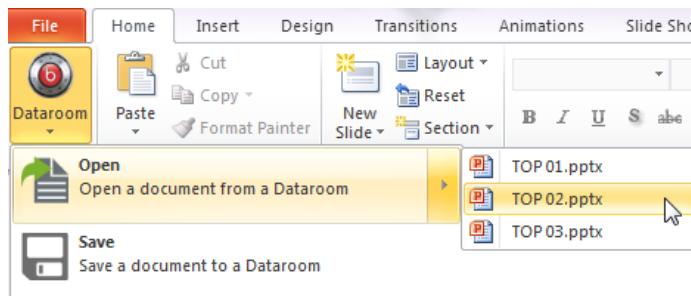


4. Select a PowerPoint document from the list and click  or double-click a document in the list to open it in Microsoft PowerPoint.

Tip: You can also select a document from the list of recently viewed PowerPoint documents next to the “Open” option in the menu (see [Open a Recently Viewed PowerPoint Document, page 12](#)) or use the “View Recently Opened Folders” option by clicking  in the top right corner of the pane to find a document.

3.2.1 Open a Recently Viewed PowerPoint Document

1. Open Microsoft PowerPoint.
2. Click the **Dataroom** button.
3. Point to the **Open** menu. The list of recently viewed PowerPoint documents is displayed to the right of the **Open** option in the menu:

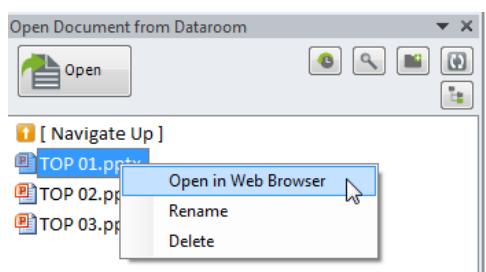


4. Select the desired PowerPoint spreadsheet from the list.

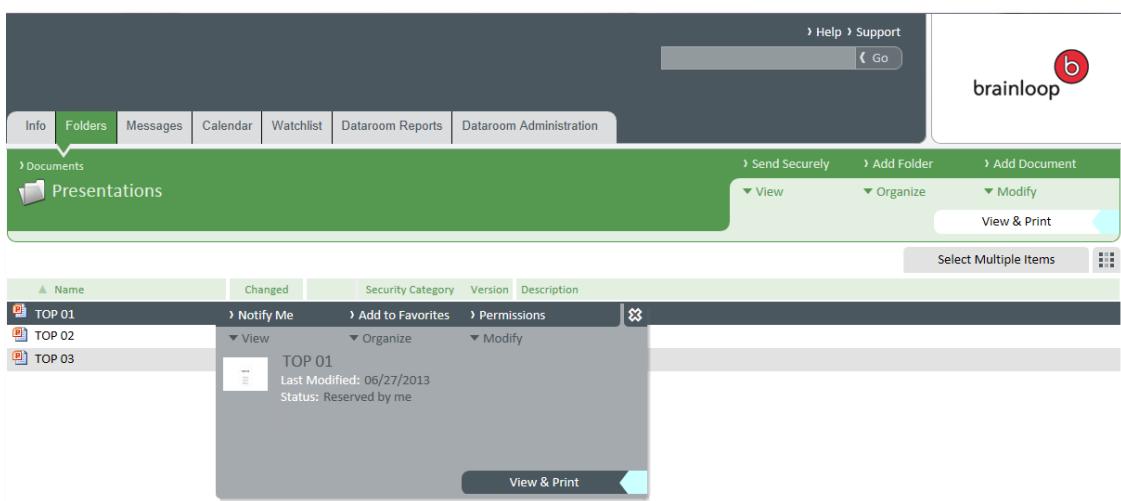
3.3 Open a PowerPoint Document in the Web Browser

To open a PowerPoint document in the Brainloop Secure Dataroom Service via your web browser, proceed as follows:

1. Right-click a document in the list and select **Open in Web Browser**.



2. You are directed to the login page of the Brainloop Secure Dataroom Service.
3. Enter your username and password, and click **Login**.
4. If the Dataroom is PIN-protected, enter the PIN you received by e-mail or by SMS and click **OK**.
5. You are directed to the document with its **Details** window open.

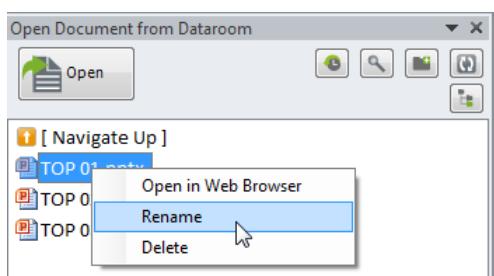


See also [Open a PowerPoint Document in the Web Browser](#), page 21.

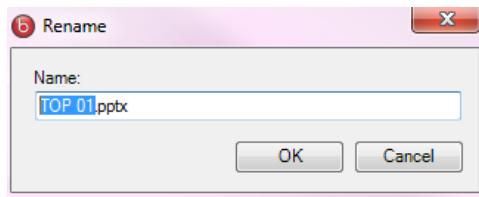
3.4 Rename a PowerPoint Document in a Dataroom

To rename a PowerPoint document in a Dataroom directly through the Brainloop Secure Connector for Microsoft PowerPoint, proceed as follows:

1. Right-click a document in the list and select **Rename**.



2. In the **Rename** dialog window overwrite the filename with a new one.

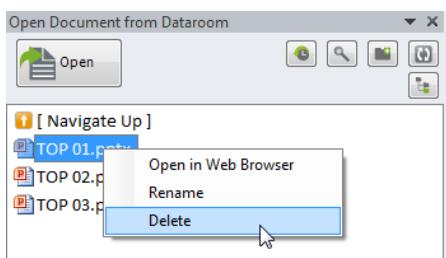


3. Click **OK** to save.

3.5 Delete a PowerPoint Document from a Dataroom

To delete a PowerPoint document from a Dataroom directly through the Brainloop Secure Connector for Microsoft PowerPoint, proceed as follows:

1. Right-click a document in the list and select **Delete**.

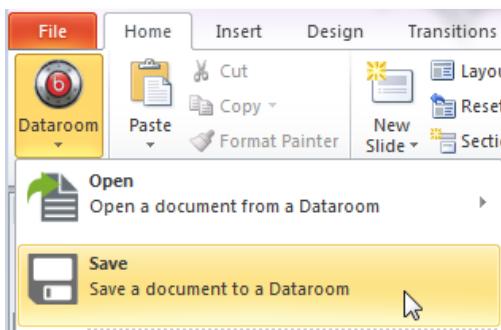


2. If you are sure that you want to delete the selected document from your Dataroom, answer the security message with **Yes**.

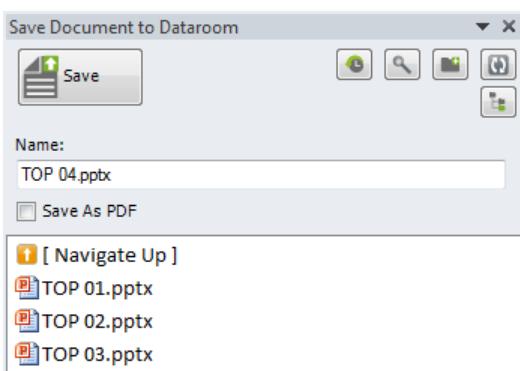
3.6 Save a PowerPoint Document to a Dataroom

3.6.1 Save a Local PowerPoint Document to a Dataroom

1. Create a new document in Microsoft PowerPoint, or open an existing local PowerPoint document.
2. Click the **Dataroom** button and select **Save**.



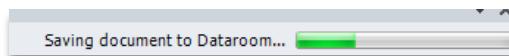
3. In the **Save Document to Dataroom** pane, navigate to the desired Dataroom folder.



4. In case of a new PowerPoint spreadsheet, enter the desired name of the new document into the **Name** field.



5. Click **Save**.
6. The document is now saved to the selected Dataroom folder. A progress bar in the bottom right corner shows the progress of that operation:

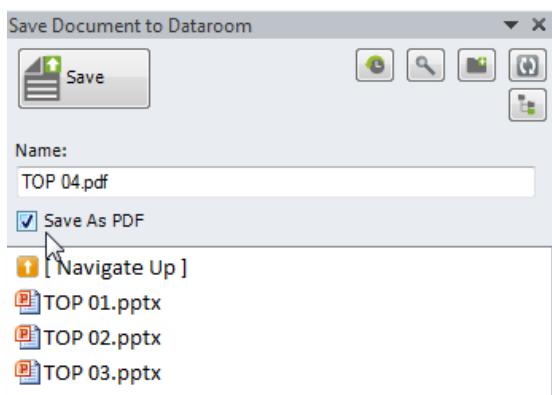




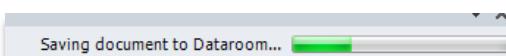
Tip: If you want information from the Brainloop Dataroom to be embedded in the document's properties, activate the “Embed Dataroom information in documents” option in the General Settings.

3.6.2 Save a PowerPoint Document to a Dataroom in PDF Format

1. Open a local document in Microsoft PowerPoint.
2. Click the **Dataroom** button and select **Save**.
3. In the **Save Document to Dataroom** pane, navigate to the desired Dataroom folder.
4. Activate the **Save as PDF** option.

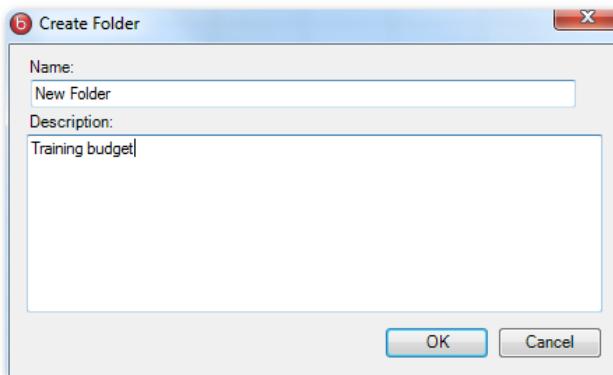


5. Select a folder from the list and click .
6. The document is now saved into a PDF file to the selected Dataroom folder. A progress bar in the bottom right corner shows the progress of that operation:



3.7 Create a New Folder in a Dataroom

1. Click the **Dataroom** button and select **Save**.
2. Click .
3. In the **Create Folder** dialog, enter the name of the folder into the **Name** field.

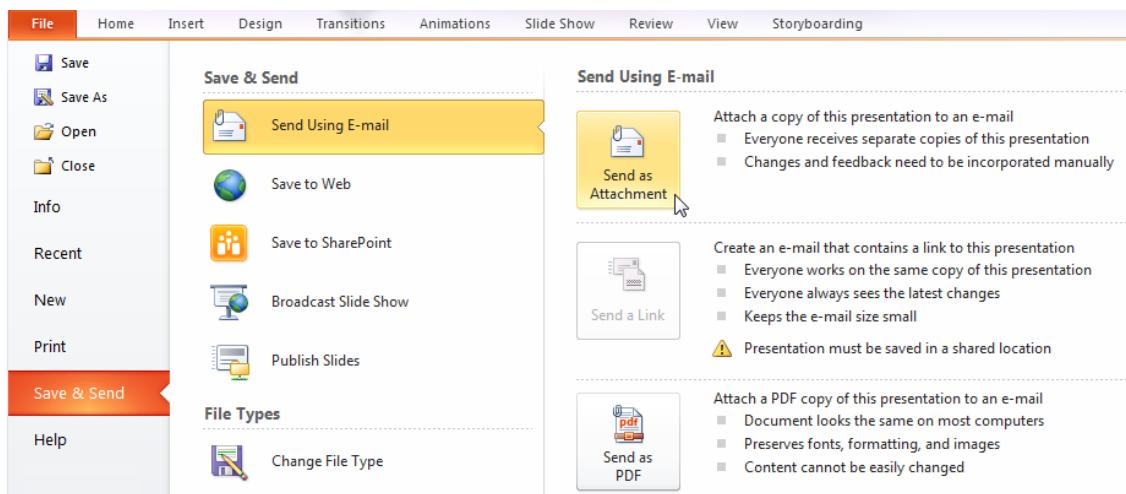


4. As an option, you can enter a folder description into the **Description** field.
5. Click **OK** to save the new folder.

3.8 Send a PowerPoint Document as Secure Link

To send a Microsoft PowerPoint document via e-mail to Dataroom members from within PowerPoint, use the **Save & Send** option integrated in the application.

1. Open the PowerPoint document you wish to send to your collaborators.
2. Select the **File** tab.
3. Select the **Save & Send** option on the left.



4. Click the **Send Using E-mail** option in the **Save & Send** section in the middle area.
5. Click the **Send as Attachment** option in the **Send Using E-mail** section in the right area.
6. A new e-mail is created and a link to the current document is added to the mail.
7. Enter the e-mail addresses of the Dataroom members using the **Brainloop Secure Mail Assistant**, enter the subject for the e-mail, and finally click the **Send** button.



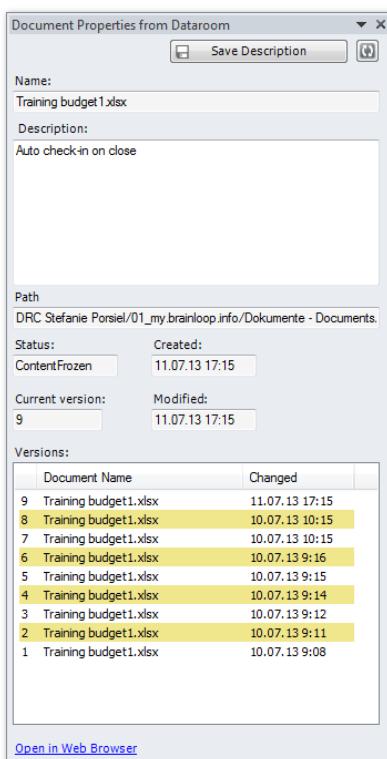
Tip: You can also use the  button in the Quick Access Toolbar of Microsoft PowerPoint to send your e-mail.

For details on using the **Brainloop Secure Mail Assistant**, please refer to our [User Guide for the Brainloop Secure Connector for Microsoft Outlook](#).

3.9 Show Document Properties from the Dataroom

To view the Dataroom properties of the opened PowerPoint document click the **Dataroom** button and

select  . In this pane, you can review and change the description, if applicable. In addition, you can see the Dataroom access path, document status, version number, version history, and the creation and modification dates as stored in the Dataroom.



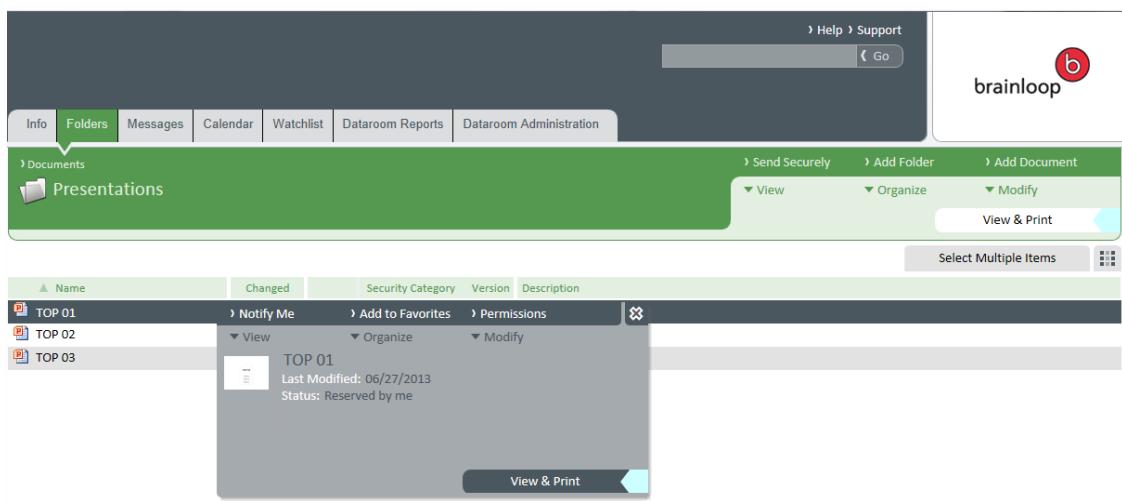
3.9.1 Add a Description to the Current PowerPoint Document

To add a description to the current document, enter your description into the **Description** field and click the  button at the top of the pane.

3.9.2 Open a PowerPoint Document in the Web Browser

To open a PowerPoint document in the Brainloop Secure Dataroom Service via your web browser, proceed as follows:

1. In the opened PowerPoint document, click the **Dataroom** button and select **Show Properties**.
2. Click the link **Open in Web Browser**.
3. You are directed to the login page of the Brainloop Secure Dataroom Service.
4. Enter your username and password, and click **Login**.
5. If the Dataroom is PIN-protected, enter the PIN you received by e-mail or by SMS and click **OK**.
6. You are directed to the document with its **Details** window open.

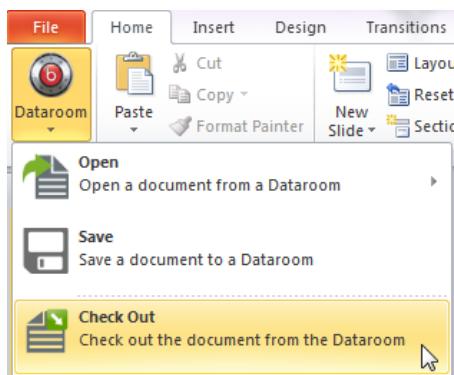


See also [Open a PowerPoint Document in the Web Browser](#), page 13.

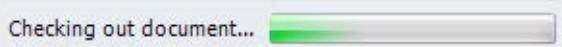
3.10 Check out a PowerPoint Document from the Dataroom

Provided your Dataroom Manager has activated the **Check-out** option for the Dataroom, you can check out a document in order to lock it for other users and prevent the document from being edited by others. **Note:** The document is automatically checked out as soon as you make changes to the document.

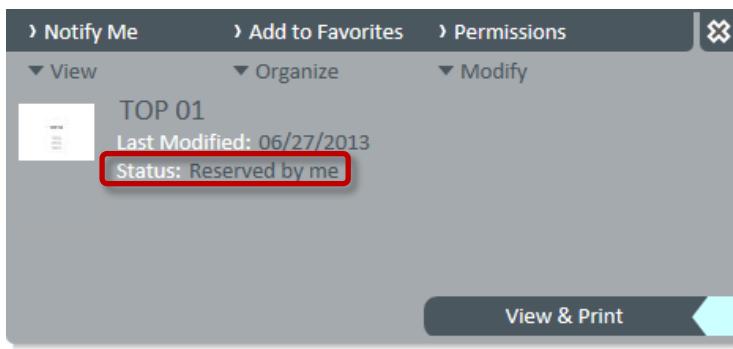
1. Open Microsoft PowerPoint.
2. Open the document you want to check out from the Dataroom.
3. Click the **Dataroom** button and select the **Check Out** option.



4. The document is now checked out from the selected Dataroom folder. A progress bar in the bottom right corner shows the progress of that operation:



5. The status of the document in the Dataroom is now **Reserved by me**:



3.11 Check a PowerPoint Document back into the Dataroom

When you check a document back in, your updated version is transferred to the Dataroom. The document is unlocked so that other users can check it out and edit it. **Note:** The document is automatically checked in when it is closed.

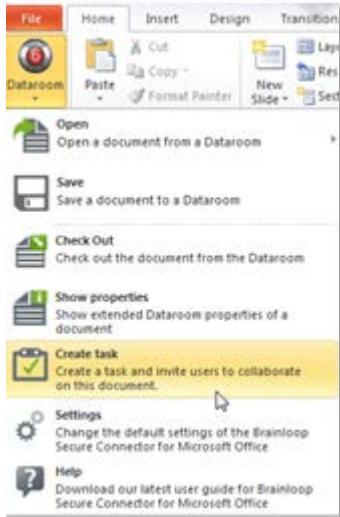
1. Click the **Dataroom** button and select the **Check In** option.
2. The document is now checked into the selected Dataroom folder. A progress bar in the bottom right corner shows the progress of that operation:



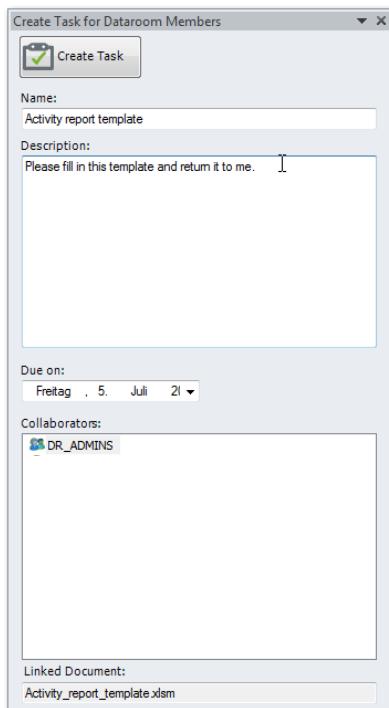
3.12 Create a Task for Collaborators

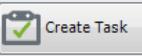
Provided your Dataroom Manager has activated the **Task** option for the Dataroom, you can create a task and send it to your collaborators via secure e-mail:

1. Click the **Dataroom** button and select the **Create Task** option.



2. Enter a name, description and due date for the task and select the desired collaborators from the **Collaborators** list.



3. Click the  button. A message confirming that the task has been created is displayed.
4. Simultaneously, an e-mail is sent out to each collaborator selected in the **Collaborators** field.

For details on handling and completing tasks, please refer to your User Manual for Brainloop Secure Dataroom Service.

4 Appendix: Document revision history

Version	Date of change	Revision
1.0	31 January 2014	First release for the Brainloop Secure Connector for Microsoft PowerPoint Version 4.3
1.1	13 July 2015	Update to version 4.4; no content changes
1.2	12 October 2015	Update to version 4.5; no content changes